

# Probate Checklist

- Secure Any Real Estate
  - ◇ Post No Trespassing Notice (If real estate is vacant)
  - ◇ Obtain Vacant Property Insurance Rider (If real estate is vacant)
  - ◇ Make Sure Real Estate & Personal Property Is Locked Up & Secure
- Obtain The Death Certificate
- Get A Copy Of The Will (if applicable)
- Notify Life Insurance Company(ies) Of The Death
- Decide On Attorney Representation (unless filing pro-se, ie. filing without legal counsel)
- Determine Which Level Of Probate Is Necessary For The Estate
- File Probate With The County Clerk
- Run A Notice To Creditors In Newspaper
- Set Up A Bank Account For The Estate
- Set Up Auto-Pay Mortgages, Utilities & Similar Bills Paid Through Disposition
- Determine Legality & Timeframe For Selling Real & Personal Property  
(speak with a Probate attorney and a real estate professional who is familiar with Probate)
- Clean Out Any Real Property
  - ◇ Have Any & All Real Property (real estate) Repaired & Maintained
    - » Lawn & Landscape Maintenance
    - » Gutter Cleaning
    - » Painting & Exterior Trim Repair
    - » Mechanical Servicing Such As HVAC, Water Heaters, & Appliances
    - » Interior Repairs & Maintenance Such As Plumbing, Electrical, Condition Upgrades, etc.
  - ◇ Identify & Divide Personal Property That Heirs Will Keep
  - ◇ Arrange For An Estate Sale Of Any Valuable Property That The Heirs Don't Want
  - ◇ Donate clothing & belongings that the heirs don't want to sell or keep
  - ◇ Schedule Cleanout Company To Dispose Of All Non-Valuable Items That The Heirs Don't Want
  - ◇ Arrange For A Final Cleaning Of The Property(ies)
- Sell Or Rent Any Real Estate Desired

- Start An Inventory Of Assets

- ◇ Life Insurance \_\_\_\_\_  
\_\_\_\_\_

- ◇ Investment Accounts \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- ◇ Checking & Savings Accounts \_\_\_\_\_  
\_\_\_\_\_

- ◇ Employer Pay \_\_\_\_\_

- ◇ Debts \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- ◇ Valuable Personal Property \_\_\_\_\_  
\_\_\_\_\_

- ◇ Real Estate (Equity) \_\_\_\_\_  
\_\_\_\_\_

- ◇ Real Estate (Mortgages) \_\_\_\_\_  
\_\_\_\_\_

- ◇ Other: \_\_\_\_\_

- Notify Known Creditors & Obtain Payoff Information - Have Them Discontinue The Accrue ment Of Interest

- Notify The Social Security Administration & Ensure Survivors Receive Benefits (If applicable)

- Finalize an asset distribution plan

- ◇ Pay the estates final debts

- ◇ Dispose of assets not going directly to heirs

- ◇ Ensure the final distribution of assets to heirs in the will or according to state intestacy laws

- Pay the estates taxes

- Close the estate

- Close the estate bank account after all debts are settled and money is distributed

- File a final accounting with the probate court and ask for the estate to be closed